



Joint Archives Board

Date: Monday, 14 November 2022
Time: 2.00 pm
Venue: Council Chamber, County Hall, Dorchester, DT1 1XJ

Members (Quorum: 2)

Laura Beddow, Richard Biggs, Simon Christopher, Lesley Dedman, Beverley Dunlop and Marion Le Poidevin

Chief Executive: Matt Prosser, County Hall, Dorchester, Dorset DT1 1XJ

For more information about this agenda please contact Democratic Services Meeting Contact 01305 224185 - george.dare@dorsetcouncil.gov.uk

Members of the public are welcome to attend this meeting, apart from any items listed in the exempt part of this agenda.

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Agenda

Item	Pages
1. APOLOGIES	
To receive any apologies for absence.	
2. APPOINTMENT OF CHAIRMAN	
To appoint a Chairman for the Joint Archives Board.	
The role of chairman shall alternate biennially between the relevant Portfolio Holder of BCP and Dorset Councils.	
3. APPOINTMENT OF VICE-CHAIRMAN	
To appoint a Vice-Chairman of the Joint Archives Board.	
4. DECLARATIONS OF INTEREST	

To disclose any pecuniary, other registrable or non-registrable interest as set out in the adopted Code of Conduct. In making their disclosure councillors are asked to state the agenda item, the nature of the interest and any action they propose to take as part of their declaration.

If required, further advice should be sought from the Monitoring Officer in advance of the meeting.

5. PUBLIC PARTICIPATION

Representatives of town or parish councils and members of the public who live, work, or represent an organisation within the Dorset Council area are welcome to submit up to two questions or two statements for each meeting. Alternatively, you could submit one question and one statement for each meeting.

All submissions must be emailed in full to george.dare@dorsetcouncil.gov.uk by 8.30am on Wednesday, 9 November 2022.

When submitting your question(s) and/or statement(s) please note that:

- no more than three minutes will be allowed for any one question or statement to be asked/read
- a question may include a short pre-amble to set the context and this will be included within the three-minute period
- please note that sub divided questions count towards your total of two
- when submitting a question please indicate who the question is for (e.g. the name of the committee or Portfolio Holder)
- Include your name, address and contact details. Only your name will be published but we may need your other details to contact you about your question or statement in advance of the meeting.
- questions and statements received in line with the council's rules for public participation will be published as a supplement to the agenda
- all questions, statements and responses will be published in full within the minutes of the meeting.

[Dorset Council Constitution](#) Procedure Rule 9

6. QUESTIONS FROM COUNCILLORS

To receive questions submitted by councillors.

Councillors can submit up to two valid questions at each meeting and sub divided questions count towards this total. Questions and statements received will be published as a supplement to the agenda and all questions, statements and responses will be published in full within the minutes of the meeting.

The submissions must be emailed in full to george.dare@dorsetcouncil.gov.uk 8.30am on Wednesday, 9 November 2022.

[Dorset Council Constitution](#) – Procedure Rule 13

7. URGENT ITEMS

To consider any items of business which the Chairman has had prior notification and considers to be urgent pursuant to section 100B (4) b) of the Local Government Act 1972. The reason for the urgency shall be recorded in the minutes.

8. JAS SERVICE PLAN (2021-26) MONITORING REPORT 5 - 34

To consider the report by the Service Manager for Archives and Records.

9. CAPITAL PROJECT UPDATE 35 - 40

To consider a report by the Service Manager for Archives and Records.

10. JOINT ARCHIVES SERVICE: FEES AND CHARGES 2023/24 41 - 48

To consider a report by the Service Manager for Archives and Records.

11. EXEMPT BUSINESS

To move the exclusion of the press and the public for the following item in view of the likely disclosure of exempt information within the meaning of paragraph 4 of schedule 12 A to the Local Government Act 1972 (as amended).

The public and the press will be asked to leave the meeting whilst the item of business is considered.

12. BUDGET MONITORING 2022/23 AND PROVISIONAL BUDGET 2023/24 49 - 60

To consider the report by the Service Manager for Archives and Records and the Service Manager (Finance).

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Joint Archives Board 14 November 2022 JAS Service Plan (2021-26) Monitoring Report

For Decision

Portfolio Holder: Services	Cllr L Beddow, Culture, Communities and Customer Services Cllr B Dunlop, Cabinet member for Culture and Vibrant Places, BCP Council
Local Councillor(s):	All
Executive Director:	J Sellgren, Executive Director of Place

Report Author: Sam Johnston
Title: Service Manager for Archives
Tel: 01305-228929
Email: sam.johnston@dorsetcouncil.gov.uk

Report Status: Public

Recommendations:

It is recommended that the Board:

- (i) Endorses the implementation of the 2021-2026 service plan appended to this report as demonstrating the quality and value for money provided by the JAS;
- (ii) Notes the range of positive and innovative work undertaken by the JAS;
- (iii) Supports the JAS's ongoing work to ensure the safe and effective transfer of appropriate physical and digital records from both BCP and Dorset Councils to ensure the preservation of the corporate memory and to deliver council efficiencies.

Reason for Recommendation:

Effective oversight of the regular service delivery element of the service plan by the Joint Archives Board is required under the terms of the Inter-Authority Agreement on Archives, 2022

1. Executive Summary

This report is the first update report to the newly-constituted Joint Archives Board on the current and future work of the Joint Archives Service (JAS). The Service Plan appended to this report carries detailed information on the service's activities and the report will highlight work undertaken against the JAS's key objectives. Since the last report, the service has:

- Continued to expand the range and type of digital preservation activities including taking the lead role in an 18-member national consortium;
- Worked to fund the cataloguing of the archives of Thomas Hardy;

- Taken a lead role in a national project to examine the status of the records of adopted and care-experienced people;
- Acquired important new council and community-generated collections.
- pursued plans for a revised capital project to address its long-standing accommodation challenges.

The JAS priorities for 2021-26 are:

- i. Actively acquire archives relating to Bournemouth, Christchurch, Dorset and Poole and to work through all available means to preserve, conserve and promote access to them to optimum effect
- ii. Design and deliver digital preservation services across both authority areas
- iii. Provide efficient, innovative and quality digital and place-based services which deliver rewarding experiences for all JAS customers and value for money for the two funding authorities
- iv. Engage a wide variety of audiences with digital and physical resources and events, recognising barriers to involvement and working actively to dismantle these
- v. Encourage and sustain on-site and remote volunteering so adding value through delivering targeted programmes of work
- vi. Develop and maintain partnerships with a range of organisations both public and private and to pursue project opportunities which both enhance funding to the JAS and deliver positive outcomes and mutual benefits to all parties
- vii. Manage and enhance the DHC building with all possible efficiency, so increasing the benefits for customers, collections and staff.

2. Financial Implications

All activities described in this report are covered by either the JAS revenue budget, reserve or an externally-sourced grant.

3. Well-being and Health Implications

The JAS contributes to wellbeing outcomes for both councils and improving the quality of life for residents of BCP and Dorset Council areas and attracting visitors to the county lie at the heart of its work.

4. Environmental implications

DHC has significantly improved its energy performance through a major project to reduce consumption whilst ensuring the maintenance of high-quality environmental controls. This, combined with the generation of solar energy through PV panels on roof elevations has rendered the building highly energy-efficient.

5. Other Implications

None

6. Risk Assessment

Having considered the risks associated with this decision, the level of risk has been identified as:

Current Risk: Medium

Residual Risk: Medium

A revised risk register can be found at the rear of the service plan. Risks are presented in descending order of severity, the key risks being:

- i) The risk of further local government funding cuts during the financial year 2023/24 and beyond.
- ii) Failure to develop preferred option to provide additional space for physical collections held at DHC.

7. Equalities Impact Assessment

The JAS has completed a full EQIA. Areas for further consideration include working with younger people and with black and ethnic minority groups and religious minorities. Improved digital provision will also assist in providing greater access to collections for people living at some distance from Dorchester.

8. Appendices

Appendix 1: Joint Archives Service Plan 2021-26

Appendix 2: Joint Archives Service Strategic Risk Register

9. Background Papers

- Public Service Quality Group statistics 2020
- JAS accession records, service statistics and records.
- Accreditation data, 2021
- Archives Unlocked, The National Archives, 2020
- JAS policies, revised 2020
- Previous reports to the JAAB

Footnote:

Issues relating to financial, legal, environmental, economic and equalities implications have been considered and any information relevant to the decision is included within the report.

1. Introduction

- 1.1 The Joint Archives Service (JAS) is Accredited by [The National Archives](#) and holds the corporate archives of its funding councils and their predecessor bodies as well as thousands of individual physical and digital collections dating from 965AD which collectively make up the written heritage and memory of Bournemouth, Christchurch, Dorset and Poole. In addition, DHC holds Public Records on behalf of HM Government.

The JAS provides services to the public in three principal ways:

- On-site - public access at Dorset History Centre (DHC);
 - Off-site - learning and community engagement;
 - Online – a large and growing market for web-based resources, particularly given the JAS’s relationship with Ancestry.co.uk, its online catalogue and digital engagement work.
- 1.2 Often a blend of one or more of these elements may be involved and JAS service provision is fundamentally a balance between collections-related preservation work and access to information and resources in a variety of formats and media.

2. Context and challenges

- 2.1 Following the [consultancy report](#) (published in March 2021) into the JAS by Elizabeth Oxborrow-Cowan and Associates and its acceptance by the JAAB at its April 2021 meeting, a new five year (2021-26) service plan was written. This draws upon some of the key findings of the consultants’ report, particularly in relation to the efficient acquisition of corporate records and the growth of digital services. The service plan has also adopted and integrated the key messages of the national strategy for archives developed by The National Archives (TNA) *Archives Unlocked* (2020), namely Trust, Enrichment and Openness.¹
- 2.2 The two most pressing challenges for the service remain (as at the last meeting of the Board):
- The continuing search for an affordable and long-term solution for the future additional collections storage required by the service. Opened in 1991, DHC is now approaching full capacity with 3,500 empty box spaces (of a total 56,000). This has developed into a revised capital project plan (see accompanying report).
 - BCP and Dorset Council records – the JAS is keen to ensure that the corporate memories of both new unitary councils plus those of the nine predecessor councils are safeguarded through the orderly and managed transfer of hard copy and digital records. This is a significant and on-going piece of work and extends to both hard copy and digital records.

3. Service Structure and Capacity

- 3.1 The service’s core Archives capacity is 11.67 fte posts which is unchanged from the previous report.

¹ <https://nationalarchives.gov.uk/archives-sector/projects-and-programmes/strategic-vision-for-archives/strategic-priorities/>

- 3.2 Since the last meeting of the JAAB, the JAS's long-standing Archive Conservation Officer has left the service. Following a recruitment process it has been possible to appoint a successor to the role. However, they are not likely to be in post until early November.
4. **Public Service**
- 4.1 In 2022 the JAS public service team adapted to a new hybrid way of working, building on the lessons learned during the pandemic period to successfully implement a booking-only approach for access to original documents, but a drop-in service for users wishing to access the library, computers, or microform facilities on site. This has freed-up staff time to work on other important pieces of work, including cataloguing specific sets of records, managing and organising the rare books collection, and creating digital content.
- 4.2 This change in opening arrangements and opening hours has meant that in the period September 2021-August 2022 we have welcomed a total of 1,047 visitors, and since the new arrangements came into place a total of 65% of our visitors (355/541) have been pre-booked. Due to the pandemic, this overall number of visitors is an increase of 124% on the previous period.
- 4.3 There remains considerable interest in the Thomas Hardy collection (aided in 2022 by the return of the Thomas Hardy conference in July, the "Hardy's Wessex" exhibition in four South-West museums, and the fundraising campaign launched by DHC to catalogue the material). Other notable collections, such as D-TWA (Sylvia Townsend Warner), NG-HH/CMR (Herrison Hospital) and D-BKL (Bankes) remain popular with customers. There has lately been some increased interest in the D-MTZ collection (Elizabeth Muntz) and D-ELP (Eldridge Pope).
- 4.4 During the last 12 months it has continued to be busy with remote enquiries. In the same September 2021-August 2022 period, we have received a total of 2,383 written enquiries (a small drop of 9% on the previous period). This drop can be explained due to the wider reopening of the service to customers following the pandemic, as people were more freely able to visit DHC once more as evidenced above.
- 4.5 In the same period we have received a total of 239 reprographic orders (total value £7,305.20). This is a drop in both number of orders (down from 339 in the same period of 2020-21) and value (down from £11,072.20 in the same period). The average value per order has dropped marginally from £32.66 to £30.57. Again these decreases are most likely as a result of more people returning to DHC in-person following the pandemic period.
- 4.6 However, in stark contrast, the number of research requests that have been received has doubled across the two year period, from 25 in the September 2020-August 2021 period, to 50 in the same period across 2021-2022. The total value of these orders has therefore increased too, up from £1,274 to £2,101. This therefore provides some evidence that certain parts of DHC's audience, particularly (it is suspected) those living a further distance away, may not be returning to DHC. It is thought that the cost of living, petrol prices, and travel expenses may be contributing to this decline in visitors from outside of Dorset. Postcodes for visitors have been collected from April 2022 (having been stopped during the pandemic period). Further comparison of these against the 2019 data would help to clarify this point.

- 4.7 Volunteers have averaged approximately 70 hours on-site at DHC in the last 12 months, contributing a total of over 800 hours. In addition, remote volunteers have contributed a further 480 hours during the period, meaning that volunteers have contributed a total of 1,280 hours since September 2021.
- 4.8 DHC has also continued to put out regular social media content – publishing a total of 76 blogs in the 12 month period, 286 tweets (to an increased audience of nearly 3000 followers), and 18 newsletters (to an audience of over 10,500 subscribers).
- 4.9 Ancestry page views have declined across the country, particularly from the height of the pandemic, but DHC records have still totalled over 2 million views on the site in the last 12 months.

5. Museums Advisor for BCP and Dorset Councils²

- 5.1 Museum Development throughout the UK has been given a “continuation year” by Arts Council England (ACE), which means that over 2023-24 there won’t be an application and assessment process for regional museum development providers, but simply a requirement for an Activity plan in February 2023 framed around the four ACE Investment Principles. A new investment programme is scheduled to run from 2024-2026.
- 5.2 Across Dorset and BCP, 2022 has continued to be a year of significant change and development. It’s been an opportunity for many BCP and Dorset museums to meaningfully refresh and extend their visitor offers following a laser focus on sustainability and resilience, post-Covid. Invigorating interpretation has been a key theme, with Sherborne Steam & Waterwheel Centre, Corfe Castle Museum, Swanage Railway Museum and Weymouth Museum all working on extensive new displays encompassing community involvement and co-curation.
- 5.3 The MDO has also been able to broker and support access to over £200,000 Dorset Council S106 and capital leverage funding for a number of museums to undertake important building conservation and interpretation work. A significant percentage of volunteer museums have worked hard to replenish and diversify their volunteer workforce and have valued the South West Museum Development tools and resources available to support this process. The MDO has directly supported organizational, governance change and board recruitment in a number of museums including Lyme Regis Museum, the Russell Cotes Art Gallery & Museum and the Keep Military Museum. Working with the Dorset Museums Association, MD has been able to secure excellent representation for community museums on the main tourism website – Visit Dorset, which we hope will support improved visitor figures across 2022/23.

6. Community Engagement

² This role is not part of the JAS funding model, but similarly covers both council areas. It is funded by BCP and Dorset Councils along with Arts Council England. Museums development and archives are closely linked and mutually supportive.

6.1 The JAS has continued its wide-ranging community engagement activity. This is now somewhat restricted due to an extended period of sickness by the Community Engagement Officer. However, various positive activities can be noted:

- Significant support for the successful application by Kushti Bok (Gypsy-Romany-Traveller community and cultural organisation) to the National Lottery Heritage Fund (NLHF). This included:
 - Supporting the installation and celebration of the Legend Pole at Kingston Maurward
 - Working with GRT group on creating information boards for historic stopping sites
 - Supporting GRT event in Borough Gardens
- In partnership with Arts Development Company a very well appreciated project at Sturminster Newton with a group with a range of disabilities re the Queen's Jubilee resulting in an inspirational film.
- The hosting of 4 Work Experience students
- The recruitment of a volunteer support worker
- Working with c.20 volunteers, including two receiving support; oral history including work on friends, acquaintances and business contacts of Elisabeth Frink;
- Support for Sturminster Museum development project on the links between Newfoundland and Sturminster Newton
- Support and training for local history groups, BU students, staff and volunteers at other organisations
- Engagement with the William Barnes Society over the archive held at DHC.
- Collaboration with the Ridgeway Singers and Band and Dorset Archives Trust who performed 2 concerts (Dorchester and Wareham) in October using manuscripts from the archives and raising awareness of the importance of this in traditional music making.
- The JAS has re-engaged with Poole Lighthouse over its archive and plans the arts centre has to catalogue and digitise its recorded history. The JAS will act to train and support volunteers and to suggest possible funding routes to pursue.

7. Records of Dorset Council and BCP Council

7.1 Following the establishment of the two new unitary authorities in April 2019, there remains a great deal to be done in terms of converging recordkeeping systems on the one hand and for the transfer of relevant records to DHC on the other.

7.2 BCP Council has transferred some records to DHC although there remain large gaps in the corporate memory (archive) and we would have expected a wider and larger set of material to have transferred. Unlike Dorset Council, BCP does not have a records management service with almost all matters relating to information management being delegated down to service level. This is likely to lead to a disjointed and inconsistent approach and explains why there has been relatively little material transferred to DHC. The JAS would be keen to support any potential change of approach to records management within BCP in the future.

7.3 On a very positive note, there have been some moves towards the transfer of digital records from BCP into the JAS's Preservica system. Following

discussions with Aspire and Children's Services in BCP, a large number of highly confidential adoption records have been ingested into Preservica. These will be locked down securely and accessible only to names BCP and Aspire staff. The digital material that was previously held on CDs is now much better preserved and secured through transfer to Preservica. A Personal Information Sharing Agreement has been signed between BCP and DHC permitting the latter to hold adoption records on behalf of the authority. The JAS hopes to make similar progress through discussions with BCP's Democratic Services and transfer of digital records from the Mod.Gov system used there.

- 7.4 Dorset Council is similarly engaged in a major programme of work to reduce estate and converge systems. A major set of title deeds and leases from legacy councils has been transferred to DHC with more to follow. In addition, a corporately-funded records management project will work through the large backlog of paper records, transferring archival material where appropriate. This will be accompanied by a new approach to digital records management and the automation of processes. This is a long-term ambition that will take several years to realise but has the capacity to transform the way the council manages its information and the way that staff and residents access it.

8. Digital Preservation

- 8.1 Dorset has led on a major local government-focussed project which has procured Preservica (as the preferred bidder) digital preservation software for a further five-year period. The previous 3-year contract expired on 31 May and after a lengthy tendering process, a new contract was entered into. On this occasion 18 archive services (including the JAS) have joined the consortium leading to a reduced (by approximately 50%) fee for all members. In addition, there is a benefit in skills-sharing and mutual support. The service is very grateful to colleagues in Legal Services and Procurement for advising and guiding the JAS through this process. New consortium partners will be admitted on the anniversary of the contract up to a total of 25.
- 8.2 Good progress has been made in exporting the digital files from DC's Mod.Gov platform into Preservica thus saving thousands of pages of printed information annually. However, there remains much work to do in relation to modernising and automating the transfer of electronic information from its originating system into Preservica or another digital preservation platform.

9. Collections Management

- 9.1 The JAS continues to receive regular, significant accessions of hard copy archives. The most notable recent material to be deposited includes:
- Plans of Bournemouth hospital
 - Records of the former Borough of Poole
 - Bournemouth Little Theatre Company archives (transfer from Bournemouth Library)
 - Thomas Hardy's plans of Athelhampton church
- 9.2 There are negotiations currently underway to acquire the archives of Bournemouth Transport Limited. A legal agreement transferring ownership of the archive has been signed and a notional £1 payment made to secure the collection.

- 9.3 Books of condolence relating to the death of HM Queen Elizabeth that were opened across BCP and Dorset Council libraries will be received at DHC and held as part of the permanent record.
- 9.4 An application to gain funding from The National Archives to support the cataloguing of the archives of Thomas Hardy was unsuccessful in its second stage. This was very disappointing although the service has been encouraged to re-apply in 2023. A total of £60,000 is required to undertake this work. As a result of this rejected bid, it was decided to try a public fundraising campaign. This has been undertaken with support from Dorset Museum, the Thomas Hardy Society and Dorset Archives Trust. A crowdfunding campaign was launched with good media coverage. However, to date only £2,500 has been raised. The challenge of raising adequate funds therefore remains although it is important that this most significant of archives is made properly available to the wider world.
- 9.5 This situation underlines how difficult it is for local authority services to gain funding for cataloguing which is one of the core functions of the JAS. Very few opportunities exist to gain additional resourcing to catalogue archives and the environment is becoming increasingly competitive.

10. Conclusion

- 10.1 The JAS has reviewed and refined its strategic priorities in its 2021-26 service plan. The JAS continues to work hard to deliver the service plan priorities and to balance its commitments and aspirations against the funding provided by the two councils as well as externally-generated income. With a major project now underway to address the future storage and public engagement requirements of the service, the resources of the service will increasingly need to focus on producing the best possible application to the National Lottery Heritage Fund.

Sam Johnston
Service Manager for Archives and Records

October 2022

Joint Archives Service

Service Development Plan

2021-2026

DORSET
HISTORY CENTRE



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1

SERVICE DESCRIPTION

The Joint Archives Service (JAS), based at Dorset History Centre (DHC), is operated on behalf of Bournemouth, Christchurch and Poole (BCP) Council and Dorset Council. Partnership between the two authorities as delivered through the joint service sits at the heart of JAS activities and underwrites all aspects of its operation as detailed in the service plan.

The JAS is the county's only accredited archive service as designated by The National Archives. Records Management and Local Studies Library services are operated on behalf of Dorset Council via separate budgets.

PURPOSE

The Service Development Plan will:

- Articulate the JAS's ambition to excel in its role as custodian of the county's archives and records
- Clarify the core functions or 'business as usual' activities of the JAS
- Describe planned projects and/or workstreams over the period 2021-26
- Demonstrate how the service contributes towards the corporate outcomes of the two funding authorities
- Provide key information about the service to enable evaluation and analysis of its performance
- Build on the analysis and recommendations of consultancy report A [Review of the Dorset Joint Archives Service](#) by Elizabeth Oxborrow-Cowan and Associates (February 2021)
- Be regularly updated to reflect the current status of particular activities.

2

VISION, MISSION, & GOALS

OUR VISION

The archival heritage and authentic record of Bournemouth, Christchurch, Dorset and Poole will be preserved by the Joint Archives Service and used to inform, educate and inspire our communities through collaboration and innovation.



OUR MISSION

To acquire, preserve and make accessible the archives of Bournemouth, Christchurch, Dorset and Poole and so promote cultural, economic, educational and social well-being; to act as the corporate memory for the two funding bodies.



OUR GOALS

We will:

- Be an open and innovative organisation, known and trusted by all
- Lead in developing systems and services which enhance the management and care of archives, records and local studies materials
- Increase the use of and access to archives and other heritage assets through a wide range of digital and public engagement activities
- Constantly improve what we do through partnership and collaboration
- Actively promote equality of access to services and the diversity of collections held by the JAS.



3

KEY PRIORITIES

The key priorities of the JAS are to:

- 1** Actively acquire archives relating to Bournemouth, Christchurch, Dorset and Poole and to work through all available means to preserve, conserve and promote access to them to optimum effect
- 2** Design and deliver digital preservation services across both authority areas
- 3** Provide efficient, innovative and quality digital and place-based services which deliver rewarding experiences for all JAS customers and value for money for the two funding authorities
- 4** Engage a wide variety of audiences with digital and physical resources and events, recognising barriers to involvement and working actively to dismantle these
- 5** Encourage and sustain on-site and remote volunteering so adding value through delivering targeted programmes of work
- 6** Develop and maintain partnerships with a range of organisations both public and private and to pursue project opportunities which both enhance funding to the JAS and deliver positive outcomes and mutual benefits to all parties
- 7** Manage and enhance the DHC building with all possible efficiency, so increasing the benefits for customers, collections and staff

Selected corporate priorities of the funding authorities to whose outcomes the JAS contributes:

BCP Council – Corporate Strategy (2021):

- Sustainable environment
- Dynamic places
- Connected communities
- Brighter futures

Dorset Council – Council Plan (2020-24):

- Unique environment
- Strong, healthy communities
- Staying safe and well
- Economic development



4

ACTION PLAN

Red Amber Green (RAG) Summary

The total number of workstreams within the current review period of the Service Development Plan is:

Red	1
Amber	1
Green	18
Total	20

For ease of comprehension the JAS's **business as usual** activities are listed adjacent to the workstream with which they have the most affinity.

KEY

<i>Symbols used:</i>	
✓	Completed
G	On track
A	Some minor slippage
R	Delays/ Serious Problems/ Not being Achieved
DF	Deferred

<i>Officers involved in specific workstreams:</i>	
SJ	Sam Johnston, Service Manager for Archives
JH	Jacqui Halewood, Principal Archivist
OS	Owen Simons, Archivist (Collections)
CP	Cassandra Pickavance, Archivist (Digital Preservation)
	Archive Conservation Officer – role currently vacant
LD	Luke Dady, Archivist (Public Services)
MG	Maria Gayton, Community Engagement Officer

Service Development Plan: workstreams and projects

Priority 1: Actively acquire archives relating to Bournemouth, Christchurch, Dorset and Poole and to work through all available means to preserve and conserve them to optimum effect;

Business as usual activities:

- Acquisition, appraisal, accessioning, and limited cataloguing of community-generated archival material, both hard copy and digital
- Proactive acquisition of Public Records
- Preservation management of collections within passively managed and [environmentally controlled repositories](#)
- Repair and conservation of documents from DHC's own collections as well as via private commissions
-

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	Workstream/Project	Lead	Outcome/Target	Timeframe	Current progress	Rag Status
1.1	Targeted acquisition of archives especially from a range of sources identified through gap analysis.	SJ/ OS	<ul style="list-style-type: none"> • Building up the collection in areas of identified weakness within the DHC holdings. • To better reflect the communities of Dorset and BCP council area. • Adding to the publicly accessible cultural heritage of the county for research on the heritage of the county. • Particular focus on business and artistic archives. 	Ongoing	<ul style="list-style-type: none"> • Discussion with Exeter University regarding a gap analysis of the DHC current holdings. • Likely to require extra staff capacity or Community Engagement projects to successfully acquire collections from some communities. • Depositors strongly encouraged to help fund costs of storage. 	
1.2	Selected purchase of documents (auction etc) using the DAT purchase fund	SJ	Acquiring for public ownership items that would otherwise be sold privately.	Ongoing steady stream of material acquired.	Steady stream of purchases. Most recent acquisition (£5,000 with grant aid) in June 2022 were some 1861 plans of Athelhampton church drawn by Thomas Hardy.	

	Workstream/Project	Lead	Outcome/Target	Timeframe	• Current progress	Rag Status
1.3	Externally funded document preservation and conservation.	JB	Rendering damaged/unusable documents available for digitisation and public access via projects.	Ongoing – as and when opportunities arise	<ul style="list-style-type: none"> • Conservator role vacated in August 2021, newly appointed conservator due to join the service in autumn '22. • Healthy body of project funding and external clients through to autumn 2021. • Successful application to NMCT (£15k grant to work on Dorset Authors). • £21k grant to work on railway plans. 	
1.4	Transfer archival content on obsolete and at-risk audio-visual formats and removable digital media to digital preservation system	CP	At risk archives are preserved and remain accessible	By December 2022	Work underway to transfer removable digital media. Significant portion of audio-visual formats have digital surrogates already. Likely to require resource to transfer remaining audio-visual formats. Potential regional digitisation project in development to which the JAS will contribute content.	

Priority 2: Design and deliver digital preservation services across both authority areas

Business as usual activities:

- Raising awareness of digital preservation, and offering advice and support to stakeholders generating and transferring digital archives.
- Proactive acquisition of council-generated hard copy and digital records in close collaboration with records management colleagues in both funding councils

	Workstream/project	Lead	Outcome(s)	Timeframe	Current progress	Rag Status
2.1	<p>Fully resourced JAS digital preservation strategy resulting in robust digital continuity for JAS and its clients:</p> <p>http://www.nationalarchives.gov.uk/documents/information-management/understanding-digital-continuity.pdf</p> <p><i>See consultancy report chapter 3</i></p>	CP/SJ	<ul style="list-style-type: none"> • Ensure the accessibility of digital content now and in the future. • Reduction in risk and guarantor of the councils' corporate memories • Collaborative opportunities with other local authorities. • Work with IT and records management colleagues over electronic records management and systems integration. 	Positive engagement with BCP over Preservica	<ul style="list-style-type: none"> • Longstanding use of Preservica software, now integrated with Epexio re: public access. • Significant ingest of Dorset Council records include Mod.Gov • BCP to ingest adoption records into Preservica • Growing skills base within JAS team. • Resourcing challenges as workload in this area grows. 	
2.2	Local authority consortium using Preservica software. Led by DHC, now includes 18 members in a new 5-year contract.	SJ/CP	To deliver cheapest possible price for access to preservation software and to share skills and knowledge.	April 2019-present.	Consortium contract will expire in June 2022 and will require re-procurement beforehand.	

Priority 3: Provide efficient, innovative and quality digital and place-based services which deliver rewarding experiences for all JAS customers and value for money for the two funding authorities;

Business as usual activities:

- High quality provision of access to original archives and local studies material on-site at DHC
- Processing of enquiries from members of the public relating to a wide variety of subject matter
- Selective digitisation of archival material to enhance access to DHC-held collections and by private commission

	Workstream/Project	Lead	Outcome(s)	Timeframe	Current Progress	RAG status
3.1	Participation in Public Services Quality surveys of archive services	LD	Score of at least 90% 'satisfied' or 'very satisfied'	2021 (biennial)	There was no survey in 2020 due the Covid-19 pandemic. 2021 survey is a remote enquiries survey Awaiting new statistical survey led by The National Archives.	G
3.2	Archive Accreditation	SJ/AI I	Meet the standard set by The National Archives covering wide range of service activities and functions	Next full accreditation review in 2024	Service successfully accredited in 2018. Service successfully re-accredited in Oct 2021 following 'light touch review' with a full re-submission in 2024.	G
3.3	Continue to develop Epexio archive catalogue and its links to Preservica together with public front end. <i>See consultancy report chapter 4</i>	JH/ LD/C P/OS	To increase the quality and varied means of access to a greater quantity of DHC-collections online. More publicly available collections-related data, including access to digital material through Preservica. (See also Priority 2)	Implementation complete by end March 2022	Further functionality development: <ul style="list-style-type: none"> • Provide paid for access to digital archives • Document ordering • Geolocation of collections to facilitate map based searching • Remote Volunteering to improve quality of customer access to collections and volunteering experiences. Continue on-site volunteering to enhance catalogue – Covid permitting	G

3.4	<p>Further investigate development of online mapping resource such as Know Your Place or similar working with Historic Environment Service (now integrated into the Archives and Records Service).</p> <p><i>See consultancy report chapter 4</i></p>	JH/ LD	<p>Enhanced access to collections. Potential to link to other SW resources</p>	Within 3 years.	<p>Potential to form part of NLHF-funded capital project public engagement programme or to be actioned as a standalone project for which external funding could be sought.</p>	G
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Priority 4: Work with a wide variety of audiences and through public engagement and advocacy to raise the profile of DHC, to encourage access to and appreciation of the archival resource;

Business as usual activities:

- Delivery of outreach services including talks, project design, workshops, tours and engagement with stakeholders, educational institutions and community groups
- Provision of digital services including the online catalogue, website, social media, blogs and material hosted by Ancestry.co.uk

	Workstream/Project	Lead	Outcome(s)	Timeframe	Progress	RAG status
4.1	Continue to work with the Cultural Hub and the Cultural Education Partnership	JH/ MG	To identify opportunities to work with BCP schools, other cultural providers and creatives to develop stimulating resources for engagement with archives in educational settings.	Ongoing until 2022 and review	Innovative mixed media resource developed and delivered Contributions to schools' 'artist in residence' projects'	A
4.2	Community engagement - support and facilitation for a range of externally-resourced groups and projects to enhance access to and enjoyment of archival heritage.	MG	Positive engagement with a range of groups and subject matter. Value of archives as source material for a wide span of uses.	Ongoing – ad hoc Ongoing – ad hoc and subject to individual project schedules	Groups include: <ul style="list-style-type: none"> • My Creative Life • Telephone Friendship Group • Valise Noir • Gypsy, Romany, Traveller (Kushti Bok) 	G
4.3	Digital promotion, advocacy and outreach, through a range of social media platforms and DHC presence on DC & BCP corporate websites and intranets– Digital Development Group <i>See consultancy report chapters 3 & 4</i>	LD/JH	<ul style="list-style-type: none"> • Raise the profile of DHC to customers and stakeholders • Provide detailed information on DHC and first point of contact • Attract new audiences • Help to sell services and generate income. • A Digital Development Strategy 	Ongoing – Digital Development Strategy by the end of 2022	New DHC Digital Development Group is actively enhancing the social media and outreach presence of the service, including developing engagement with BCP and DC Communications services.	G

Priority 5: Increase and sustain on-site and remote volunteering so adding value through delivering targeted programmes of work;

	Workstream/Project	Lead	Outcome(s)	Timeframe	Progress	RAG status
5.1	Developing a strong on-site and remote volunteer programme. <i>See consultancy report chapter 3</i>	OS/JB/MG/LD	<ul style="list-style-type: none"> Delivering critical 'added value' capacity, sorting, repackaging, listing collections and for Community Engagement projects Involving the community in the life of DHC and its collections. Includes work experience opportunities for young people. Wider range of projects for volunteers to engage with (digitisation, research, oral history, conservation, cataloguing, collections indexing). 	Ongoing and review annually	<ul style="list-style-type: none"> Epexio offers remote volunteering opportunities, e.g. geo-tagging. Service is reorganising and re-focussing its volunteering offer and programme post-Covid and in the light of technological change. Maintain standards gained through Investors in Volunteers 	
5.2	Dorset Archives Trust (DAT) www.dorsetarchivestrust.org	SJ/JH	<p>Mobilising the effective support of DAT for DHC projects through its 3 key priorities:</p> <ul style="list-style-type: none"> Fundraising Collections development Advocacy 	Ongoing annual review Annual review prior to AGM	Membership steadily increasing. Events programme based around archive collections. Crowdfunding for Hardy's archives. Successful funding bids on behalf of DHC priority projects will be important in terms of fundraising in the event of a capital project.	

Priority 6: Develop and sustain partnerships with a range of organisations both public and private and to pursue project opportunities which both enhance funding to the JAS and deliver mutual benefits;

	Workstream/project	Lead	Outcome(s)	Timeframe	Current progress	Rag Status
6.1	Seek external funding for collections related projects including cataloguing, conservation and selective digitisation	SJ/JH	<ul style="list-style-type: none"> • Make large quantities of new material available to the public. • Assist preservation through digital facsimiles; • Increase the JAS's online presence via catalogue and other digital tools. • Complement scarce core resources. 	Ongoing, but subject to available funding opportunities and programmes	<p>Reliant upon opportunities to seek funding through either public or private sources.</p> <p>Collections requiring investment include:</p> <ul style="list-style-type: none"> • Wessex Water • Quarter Sessions • 'Dorset Authors' (Hardy, Barnes, Townsend Warner) • Records of local government and predecessor councils 	
6.2	Archives South West – regional head of repository group working on strategic areas of mutual interest.	SJ/CP	<ul style="list-style-type: none"> • Share knowledge and skills • Promote archival best practice • Partnership fundraising opportunities 	Ongoing – project based activity subject to funding	Following a successful application to The National Archives and a project to analyse the digitisation of historic newsprint, ASW is now seeking to deliver a smaller follow-on project focussing on the acquisition of community-generated digital archives.	
6.3	Investigate partnerships with academic institutions to better exploit DHC-held collections and encourage student and academic interest in archives.	SJ/OS/JH	<ul style="list-style-type: none"> • Strong links to regional HE institutions • Possible collaborative projects • Opens up new potential sources of funding through external grants. 	Ongoing; annual review of MoUs and project opportunities via academic departments.	<p>Positive activities:</p> <ol style="list-style-type: none"> Building relationship via MoU with Bournemouth University through the capital scheme and library services. Links with AUB re: Poole Pottery and Frink archives Opportunities emerging with BU and its BA in Public History – work experience and extended project placements. MoU signed in 2020 with University of Exeter. Student travel fund (DAT). 	

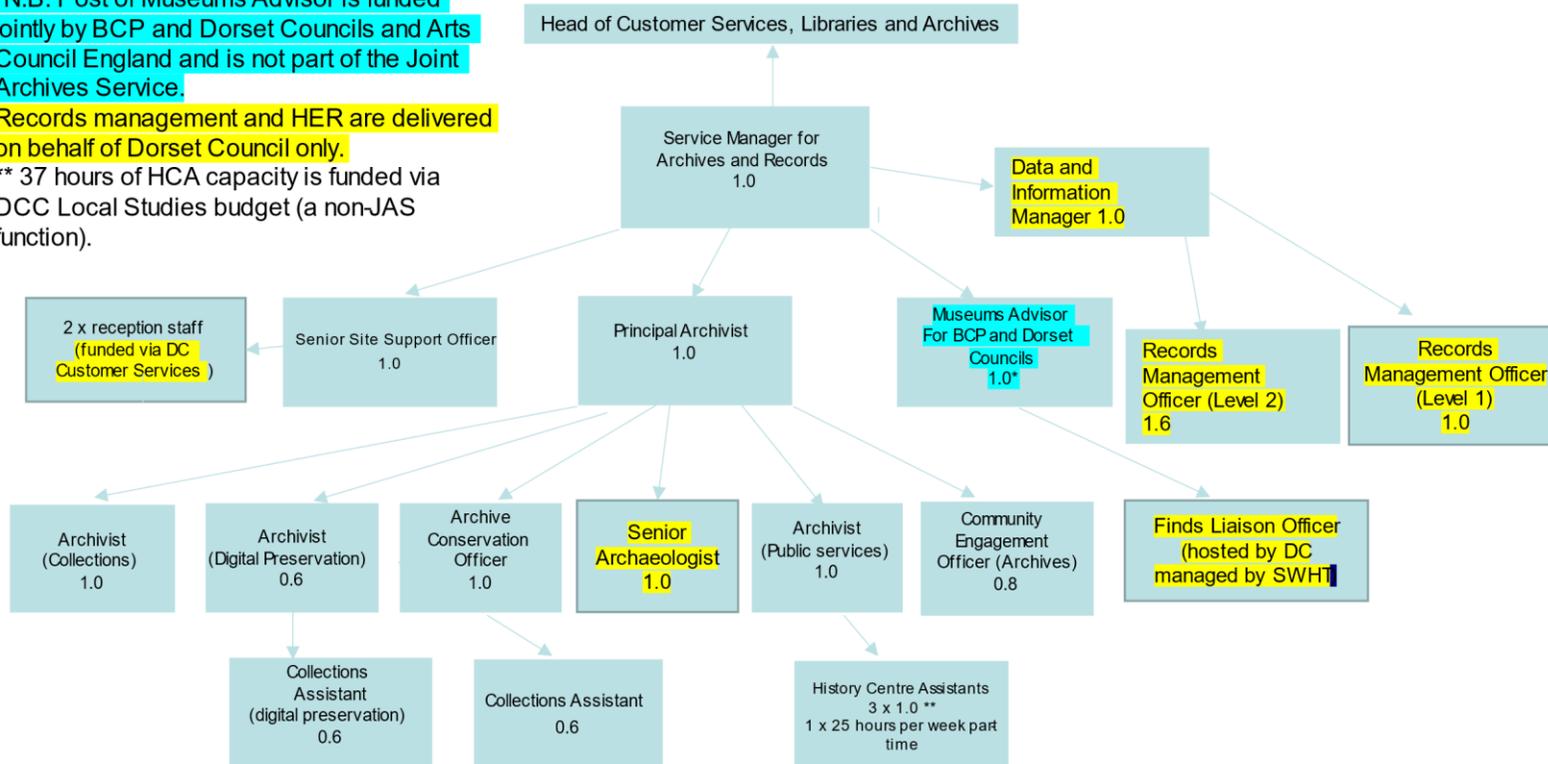
Priority 7: Manage and enhance the DHC building with all possible efficiency, so increasing the benefits for customers, collections and staff;

	Workstream/project	Lead	Outcome(s)	Timeframe	Current progress	Rag Status
7.1	Capital project; extension of DHC building to ensure adequate future space for collections. <i>See consultancy report chapter 6</i>	All	<ul style="list-style-type: none"> • Ensure appropriate storage is available for the next 25-30 years of hard copy archive acquisition. • Ensure that the best value 'full life' solution is agreed. • Wide programme of public and community engagement across the county (if NLHF-funded). • Improve public access to the building 	HLF project rejected Dec 17; 2021 strategy review.	<ul style="list-style-type: none"> • 'Light touch' review of options appraisal (2013) to confirm best solution for additional accommodation (May 2021) • Currently awaiting steer from the two funding councils. 	
7.2	Take part in Dorset Council energy efficiency initiatives and projects. Pursue the improvement of the fabric of the DHC building	SJ/JH	To improve fabric and energy consumption in DHC building – (heat pump and low energy lighting, roof and facias and soffits, lift)	2022	<ul style="list-style-type: none"> • DC has been awarded funding for improved energy efficiency projects. • New PV solar arrays added to DHC roof summer 2022. 	

5. Service structure

Joint Archives and RM Service Structure November 2022

*N.B. Post of Museums Advisor is funded jointly by BCP and Dorset Councils and Arts Council England and is not part of the Joint Archives Service.
 Records management and HER are delivered on behalf of Dorset Council only.
 ** 37 hours of HCA capacity is funded via DCC Local Studies budget (a non-JAS function).



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5. Risk Register

October 2022
Archives Service Strategic Funding
(Risks have been listed in order of severity)

Risk Scoring	Impact	H	6	8	9
L = Low		M	3	5	7
M = Medium		L	1	2	4
H - High			L	M	H
			Probability		

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Risk No.	Risk Description	Likely Impact if Risk Occurs	Impact H/M/L	Probability H/M/L	Score	Counter Measures	Comment
1	Core Funding: continued risk to local government funding from 2022/23. This will need to be factored into the JAS's ability to maintain current levels of service delivery.	Further reductions in standards, levels and capacity of services offered by JAS - potentially taking it below the minimal effective level through the loss of distinct functions	H	H	9	Consultants' report indicates few obvious additional sources of revenue not already accessed. Ensure understanding of value for money through CIPFA benchmarking and TNA Accreditation. Importance of digital preservation in supporting business continuity and will	Standstill budgets in 7 of 8 years. Inflationary pressure specifically from national pay agreement and business rates rise. Important to gauge the views of the two unitary councils on the role and priorities

Risk No.	Risk Description	Likely Impact if Risk Occurs	Impact H/M/L	Probability H/M/L	Score	Counter Measures	Comment
						require increased resourcing in the future.	
2	Failure to develop preferred option to provide extra space for JAS collections	Finite and diminishing space within repositories. DHC would, in time, have to start refusing material. Failure to preserve corporate memory or Dorset's heritage. Potential revenue cost implication if space has to be rented.	H	H	9	Discussions between BCP and DC to establish the terms on which a capital project might be undertaken. Full life cost of DHC extension is the cheapest solution. External storage would be much more expensive in the long term.	Project will be pursued once clear trajectory is established.
3	Funding for digital preservation is not continued and work concludes without long-term sustainable solution.	Failure to provide digital preservation services for funding authorities and wider community. Information loss and/or data corruption. Potential legal implications.	H	M	7	Prove the long-term benefits of digital preservation and the risks and consequences of not having such a system. DC finance in place until 2021. Consortium model has halved costs to each member. Need BCP Council to adopt digital preservation via Preservica.	<ul style="list-style-type: none"> The JAS is leading the local authority sector in working on digital preservation. Information loss/corruption is a major risk to the corporate memory of both authorities. Evidence of growing understanding of digital preservation and its benefits.

<p>4</p>	<p>Dorset Archives Trust: failure to sustain Dorset Archives Trust due to lack of external interest and low capacity to support from within DHC.</p>	<p>No revenue impact; loss of support in communities, harm to reputation and loss of potential for special projects and funding to benefit Dorset's archives.</p>	<p>M</p>	<p>L</p>	<p>3</p>	<ul style="list-style-type: none"> • Cultivate new trustees to strengthen body. • Ensure alignment of DHC activities and those of DAT. 	<p>Body increasing in confidence and understanding. Very positive results in terms of fundraising.</p>
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Joint Archives Board 14 November 2022 Capital Project Update

For Decision

Portfolio Holder:	Cllr L Beddow, Culture, Communities and Customer Services
	Cllr B Dunlop, Cabinet member for Culture and Vibrant Places, BCP Council
Local Councillor(s):	All
Executive Director:	J Sellgren, Executive Director of Place

Report Author: Sam Johnston
Title: Service Manager for Archives and Records
Tel: 01305-228929
Email: sam.johnston@dorsetcouncil.gov.uk

Report Status: Public

Recommendation:

- It is recommended that the Board:
1. Notes the progress made towards developing an application to the National Heritage Lottery Fund.
 2. Notes the deployment of the JAS reserves to support work on the Lottery application.

Reason for Recommendation:

To ensure the viability of the capital project proposal; without professional buildings-relates support the project will not be fit for purpose.

1. Executive Summary

The storage repositories of the Dorset History Centre (DHC) in Dorchester home of the Joint Archives Service (JAS) are approaching capacity. Built in 1991, there remains relatively little space in which to house physical collections. Following an unsuccessful application for Heritage Lottery support in 2017, a new project is now afoot which it is intended will resource the building of new archive storage facilities and fund a major programme of public engagement. An

application to the National Lottery Heritage Fund is in development and is scheduled to be submitted in May 2023.

2. Financial Implications

To date, spending of £45,000 on consultancy services has been approved from the JAS's reserve. This should be sufficient to help shape the Stage 1 application to the Lottery. A significant capital contribution will additionally be required as match funding for the application to NLHF. This has been raised through Dorset Council's capital funding programme. Funds would not be actually required until 2025 following a successful Stage 2 application to NLHF.

3. Well-being and Health Implications

None

4. Environmental implications

There are no immediate environmental implications. However, it should be noted that the structural elements of the project will be designed to be as energy efficient as is feasible and to use passive environmental management to the fullest extent possible. Provision has been made within the budget for a Passivhaus advisor to ensure that the most effective design is adopted.

5. Other Implications

None

6. Risk Assessment

Having considered the risks associated with this decision, the level of risk has been identified as:

Current Risk: Medium

Residual Risk: Medium

7. Equalities Impact Assessment

The JAS has completed a full EQIA. Areas for further consideration include working with younger people and with black and ethnic minority groups and religious minorities. Improved digital provision will also assist in providing greater access to collections for people living at some distance from Dorchester.

8. Appendices

9. Background Papers

- 2017 application documentation to Heritage Lottery Fund
- Website of the [National Lottery Heritage Fund](#)

Footnote:

Issues relating to financial, legal, environmental, economic and equalities implications have been considered and any information relevant to the decision is included within the report.

1. Background and context

1.1 The Joint Archives Service (JAS) has had a long-standing business requirement to extend the storage space it has at Dorset History Centre (DHC) for physical archives. Although it is inevitable that in the long-term, the transfer of archives to the service will become a largely digital transaction, there is likely to be a lengthy period where a 'mixed economy' operates. Built in 1991 with predicted storage space for 25 years of accruals, DHC is now approaching capacity. Around 3,500 vacant box spaces remain with over 500 having been filled since the last report to the Board in March 2022.

1.2 Work to address this long-anticipated need began in 2012 with an options appraisal and a feasibility study. Following an unsuccessful approach to the Heritage Lottery Fund in 2017, Local Government Reorganisation in 2019 and the Covid pandemic, the service is now moving forward with a new application to the National Lottery Heritage Fund (NLHF). This has been confirmed by two important developments:

- The approval in May 2022 by the Cabinets of both BCP and Dorset Councils of a refreshed and re-purposed Inter-Authority Agreement on Archives. This re-affirmed the rationale and support within both councils to continue their joint funding and governance of the JAS. It also clarified that capital funding for the project needed to be provided by the authority which owned the Dorset History Centre, namely Dorset Council.
- An encouraging response in May 2022 to the Expression of Interest submitted by the JAS to the London and South Committee of the NLHF. The latter provided positive feedback to the project proposal and gave an explicit invitation to submit an application within a 12-month period – i.e. by May 2023.

2. Preparation of application

2.1 Since May the JAS has been working on a new project plan which will form the basis of its application to NLHF. The approach to the NLHF consists of a two-stage application process and will take several years to achieve. The working title of the project is ***Parchment and Pixels – building resilience for Dorset's archives***. The ambition is to focus as much on the digital dimension to archives as to the physical with a particular emphasis on digital preservation.

2.2 As part of the project development, the service has put together a short film detailing its aspiration and themes. The film is narrated by broadcaster Kate Adie who is a patron of the Dorset Archives Trust. The film can be viewed here: https://www.youtube.com/watch?v=EUy_pyKaBCs

2.3 The key elements of the project are:

- The provision of a new two-storey repository block which will provide c. 30 years of additional accommodation for physical archives including photographs, film and large or 'outsize' items.
- Improvements to the public areas of DHC to include re-designed, flexible spaces for a wide range of potential users and a new public entrance to make the building and its contents more intuitive and welcoming.
- A major programme of public engagement activity focussed upon collections and people – and bringing the two together. Key drivers are likely to be:
 - Opening up more collections for research, leisure and enjoyment
 - Telling more of the stories of under-represented communities
 - Ensuring archives are more visible, both physically and digitally
 - Raising the profile of digital assets and educating the wider public in how to safeguard digital materials

2.4 Competition for Lottery funding is intense and the project will need to clearly meet the Fund's outcomes, most importantly its mandatory outcome *a wider range of people will be involved in heritage*. It is vital therefore that the public engagement work that is programmed connects to new audiences and will encourage different and sustainable approaches to engaging with archives.

2.5 The JAS team has taken advice from various successful capital archive projects (Cornwall, Plymouth, Gloucestershire) and will continue to learn from places which have recently received Lottery investment (Suffolk, Staffordshire).

3. Consultancy support

3.1 Following the endorsement and funding allocation by the Board at its last meeting in March, a brief for consultancy services to support the Lottery application process was advertised. After scoring and evaluation this was awarded to Julia Holberry Associates. Julia and her team supported the JAS in its 2015 Bankes archive project so knows the service well. A project initiation meeting with Julia and her colleague Christina Dixon was held in mid-August and work has now started to bring the project planning. This involves the interviewing of key stakeholders, the hosting of 2 focus groups and a public survey. Work will intensify towards the submission period and a large amount of planning and collation will need to take place before a suitably prepared application can be submitted.

4. Architectural and property services

4.1 As part of the project planning, the JAS has engaged with Dorset Council's Property Services team. Most of the professional services required by the

DHC project will need to be procured via the council's Comensura portal. To this end, a review of the previous feasibility work was carried out which in turn led to the formation of a brief. Property colleagues then took this out via Comensura and various quotations have been received for architectural, quantity surveying, mechanical, electrical and structural engineering and project management.

- 4.2 The costs for these services will be c. £25,000. Senior officer approval for this spend, drawing upon the services reserves has been received and the work commissioned. Given the current unpredictable state of inflation and raw material costs a major challenge for the consultants will be to gauge the likely costs of construction in 2025 when structural work on the project will potentially begin.

5. Timeframe

- 5.1 The application to NLHF will need to be submitted through the online portal by early May 2023. Prior to this, the application form and all supporting evidence will need to be prepared, collated and cross-checked.
- 5.2 It is anticipated that at times various JAS staff will need to focus almost exclusively on the application to ensure that it meets the high standard expected. However, Julia Holberry and Associates will provide support and scrutiny to ensure that the project complies with NLHF expectations and that it meets the necessary outcomes.

6. Next steps

- 6.1 The JAS team is about to commit a significant part of its staffing resource to the shaping and development of the capital project and of the Lottery application that will ensue. The project is the clear priority for the JAS in the coming months and years as the service's sustainability as a collecting body depends on successfully delivering an expanded and improved Dorset History Centre.

Sam Johnston
Service Manager for Archives and Records
October 2022

Joint Archives Board

14 November 2022

Joint Archives Service: Fees and Charges 2023/24

For Decision

Portfolio Holder: Cllr L Beddow, Culture, Communities and Customer Services
Cllr B Dunlop, Cabinet member for Culture and Vibrant Places, BCP Council

Local Councillor(s): All

Executive Director: J Sellgren, Executive Director of Place

Report Author: Sam Johnston
Title: Service Manager for Archives and Records
Tel: 01305-228929
Email: sam.johnston@dorsetcouncil.gov.uk

Report Status: Public

Brief Summary: The report provides a review of fees and charges in regard to new products and re-pricing together with recommendations for changes in Joint Archives Services fees and charges to take effect 1 April 2023.

Recommendation: It is recommended that the revised fees and charges (set out in Appendices 1-2) be recommended to the executive bodies of the two funding councils for implementation from 1 April 2023.

Reason for Recommendation: To sustain the Joint Archives Service's budget and income levels and meet the inflationary income target set as part of the budget building process.

1. **Background**

- 1.1 The Joint Archives Service's fees and charges were last reviewed at the Joint Archives Advisory Board meeting on 5 February 2021 and came into force on 1 April 2021
- 1.2 It is proposed that the revised fees and charges set out in the Appendices be implemented with effect from 1 April 2023.
- 1.3 At its meeting in May 2006, the Board agreed to give the County Archivist (now Service Manager for Archives and Records) the discretion to set and vary initial prices and to negotiate discounts as appropriate for new products or services between reviews and that these should be reported and recommended to the Board in the following review of fees and charges. This need continues as the service delivery evolves due to technical innovation and circumstances, such as the Covid pandemic. Recent additional or revised charges are included in Appendix 1.

2. **Review**

- 2.1 As is usually the case, it is not proposed to raise all charges where the Service is still in line with the market and comparable organisations. The charges have been compared with other services in the longstanding Benchmarking Group with Surrey History Centre, West Sussex Record Office and Hampshire Archives Service as well as comparison with other archive services in the South-West
- 2.2 Nevertheless, all charges have been reviewed to broadly meet the income target increase of 5% in line with Dorset Council guidelines and to standardise some similar charges.
- 2.3 There have been significant changes to the method of delivery of some services. The ability to deliver digital copying through electronic transfer or email is now preferred to printing or copying to CD and posting.
- 2.4 The commercial reproduction rates have been revised following review against other museum and archive services and the changes in delivery in this area.

- 2.5 Car parking charges at Dorset History Centre are regulated through a Traffic Regulation Order in force since 2018 and are changed in line with the charges levied by Dorset Council

3. **Conclusion**

- 3.1 This report has set out proposals for various amendments to the JAS's schedule of fees and charges. Increases have been proposed only where it is felt that they are realistic, are linked to inflationary pressures and where there have been improvements or changes to the method of delivery and standard of provision.

4. **Financial Implications**

Any increase in income through the proposed adjustments to fees and charges will assist in supporting the work of the JAS.

5. **Environmental Implications**

As much as is possible, hard copy reprographic orders are now hardly ever requested and almost all copies are provided in digital formats.

6. **Well-being and Health Implications**

N/a

7. **Other Implications**

N/a

8. **Risk Assessment**

- 8.1 **HAVING CONSIDERED:** the risks associated with this decision; the level of risk has been identified as:

Current Risk: Low

Residual Risk: Low

9. **Equalities Impact Assessment**

The JAS has completed a full EQIA. Areas for further consideration include working with younger people and with black and ethnic minority groups and religious minorities. Improved digital provision will also assist in providing greater access to collections for people living at some distance from Dorchester.

10. **Appendices**

Appendix 1: Dorset History Centre Fees and Charges 2023/2024

11. **Background Papers**

None

Accessibility Tips: (Delete header once you have considered the tips)

Appendix 1

Joint Archives Service Fees and Charges 2023/2024

	Current Price	Proposed new price (changes in bold)
<u>Photocopies/ Microform print out ordered and supplied during visit</u>		
Photocopies/MF printout (B&W) (A4 or A3)	£1.00	£1.00
Photocopies/MF printout (colour) (A4 or A3)	£2.00	£2.00
Minimum charge for photocopies/MF ordered and supplied by post, includes up to 4 A4 or A3 sheets	£8.00	£8.50
Postage and packaging	£1.80	From £2.20
<u>Digital copying services - supplied by email/electronic transfer</u>		
TIFF images	£9.00	£9.50
JPEG images	£6.00	£6.50
Additional consecutive pages in bound volumes	£1.50	£2.00
Handling charge	£3.00	£3.00
Sound files	£8.00	£9.50
Tithe maps and apportionments	£15.00	£20.00
Resupply by WeTransfer admin fee	£5.00	£5.00
Supply of files on CD	£5.00	£6.00
<u>Public self-service copying</u>		
Photocopying (B&W) (A4 or A3)	£0.25	£0.25
MF printout	£0.70	£0.70
Printout from computers	£0.70	£0.70
Photography permits (day)	£10.00	£7.00 for half day £12.00 for whole day
Photography permits (week)	£35.00	£32.00
<u>Certification services</u>		
Certification of copies (including searching for specific entries, copies and certification)	£17.00	£18.00

Baptism or burial certificate from a parish register entry	£31.00	£32.00*
<u>Research/consultation and advice services</u>		
Enquiries (30 minute look-up)	£10.00	£15.00
Research service (per hour)	£37.00	£38.00
One-to-one surgery - research topic consultation (per hour)	£30.00	£32.00
Professional consultation/advice	£60.00	£65.00
Magistrates (per hour)	£35.00	£38.00
<u>Conservation services</u>		
Treatment proposal (where items assessed at DHC) (per hour)	£35.00	£38.00
Conservation - collection condition survey and written report (at customers site) (per hour)	£35.00	£38.00
Conservation treatment fee (per hour)	£60.00	£68.00
<u>Community engagement, outreach and education services</u>		
Offsite talk, lecture (standard talks)	£70.00	£75.00
Online talks by DHC staff for other organisation (standard talks)	£60.00	£65.00
Onsite talk/lecture; introductory tours and visits	£60.00	£65.00 (for groups up to 12 people)
Bespoke/specialist talks requiring substantial research	£80.00	£85.00
Online events (talks/workshops) organised by DHC	£5.00	£6.00 per person
Onsite workshop/training session (oral history or family history)	£120.00	£125.00 (for groups up to 10 people)
Offsite workshop/training session (oral history or family history)	£130.00	£135.00 (for groups up to 10 people)
Full day workshop	£15.00	£16.00 per person
Downloadable education packs	£20.00	£21.00 (variable depending on pack)

Outreach taught session at school (incl. copies of documents, transcripts and session plans) (2 hours)	£80.00	£85.00 (plus travel expenses)
Outreach taught session at DHC (incl. copies of documents, transcripts and session plans, lecture room hire and original records (2 hours)	£80.00	£85.00

<u>Miscellaneous</u>		
Coffee/tea in common room	£1.50	£2.00
<u>Hire of lecture room</u>		
Mon-Fri, 9am-5pm (2 hour booking minimum) (full rate)	£12.00	£16.00ph
Mon-Fri, 9am-5pm (2 hour booking minimum) (charity rate)	£9.00	£13.00ph
Saturday, 1st Saturday of the month, per hour (2 hour booking minimum) (full rate)	£12.00	£16.00ph (plus admin fee)
Saturday, 1st Saturday of the month, per hour (2 hour booking minimum) (charity rate)	£9.00	£13.00ph (plus admin fee)
Saturday - when DHC is closed	On request	On request
Evenings	On request	On request
Cancellation fee (less than 3 days' notice)	£17.00	£20.00
<u>Car parking - tied to DC charges**</u>		
Monday-Sunday 8am-6pm		
Up to 1 hour	£0.70	£1.00
Up to 2 hours	£1.00	£1.50
Up to 3 hours	£2.00	£2.20
Up to 4 hours (no return)	£3.00	£3.50
Disabled badge holders maximum stay of 3 hours	Free	Free

* Fee subject to change by Church of England

** Fees subject to Dorset Council prices and may change

<u>Commercial fees and charges***</u>	
<u>Books, periodicals, journals, exhibition catalogues</u>	
One country, single language publication (print run <1000)	£20.00
One country, single language publication (print run >1000)	£30.00
Worldwide publication	£40.00

<u>Local publications</u>	
Local society/author (Dorset only)	£15.00
Local society/author (national)	£18.00
Dissertation	£15.00
<u>Newspapers, magazines</u>	
Local (Dorset)	£30.00
National	£50.00
Worldwide	£100.00
<u>Film, TV</u>	
Single image in television programme, national or worldwide	£50.00
Broadcast and film rights, national or worldwide	£200.00
TV film or radio company filming/recording on site (to incl. venue hire, staff time)	£120.00 ph
Set up time for filming (For furniture moving etc)	£40.00 ph
<u>Lectures, talks, exhibitions (non-DHC)</u>	
Educational/ temporary	£10.00 per image
Commercial/ permanent	£50.00 per image
<u>Internet</u>	
Personal blog, including YouTube/other video websites	£10.00 per image
Commercial website	£50.00 per image

***Commercial fees and charges are an entirely new system of charging, replacing the previous three-tiered rates for 'not-for-profit publication', 'commercial publication local', and 'commercial publication national'.

By virtue of paragraph(s) 4 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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